

# LIMITLESS Coaching Call Transcript

MAY 24<sup>TH</sup>, 2021  
LIMITLESS COACHING CALL  
NEXT BEST STEPS

212

00:21:47.790 --> 00:21:54.720

Stephanie Bogan: Alright, so today's call is next best step, as usual, I have an advisor coach with me today it is Adam Adam say hello, everyone can see you.

213

00:21:55.140 --> 00:21:56.070

Adam Cmejla: Hello everybody.

214

00:21:57.150 --> 00:21:59.130

Stephanie Bogan: Adam and his usual locale.

215

00:22:01.260 --> 00:22:10.260

Stephanie Bogan: We really wanted to talk about where you are right now, so I wanted to make this slide that we've been using as a grounding sort of a visual cue.

216

00:22:10.650 --> 00:22:18.840

Stephanie Bogan: If you were going to turn this slide into a checklist literally printed out without the boxes that are currently checked off if you want one of those, please let me know I'll make you one.

217

00:22:19.410 --> 00:22:38.820

Stephanie Bogan: Is what have you not mastered But what have you started on and or completed in terms of progress so let's just Adam and I were literally like let's walk back through the lessons that we've covered so far, because what you may have noticed at this point is there's a lot on this page.

218

00:22:40.350 --> 00:22:51.630

Stephanie Bogan: So if you're feeling like wow I really love on the list, but oh my gosh there's a little overwhelmed I want you to understand is because your brain is trying to digest everything on this page.

219

00:22:52.440 --> 00:23:00.480

Stephanie Bogan: you're going to remember about a third of what we cover that's what I can tell you from a brain standpoint it's better than average like we're optimizing it was like.

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00:23:00.720 --> 00:23:07.590

Stephanie Bogan: you'll remember the core things so that you know what your reference points are when you go back you'll know what a service system is now.



221

00:23:08.100 --> 00:23:13.230

Stephanie Bogan: Right, you know it should be standardized you know, should be systematized you know it can be specialized when you get to that next level.

222

00:23:13.530 --> 00:23:20.760

Stephanie Bogan: As long as you know that the big idea is that scaling up doesn't mean watering down those are the three main point, as long as you've got that.

223

00:23:21.390 --> 00:23:26.040

Stephanie Bogan: Right, then the lesson will be there, so the idea is I really just want to go through these.

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00:23:26.820 --> 00:23:36.750

Stephanie Bogan: and talk through what the outcome of them are the outputs should be, and then, if you guys want to jump in and share some of where you are, or you have questions, please do that but we're going to take.

225

00:23:37.050 --> 00:23:41.550

Stephanie Bogan: This slide on the next slide we're going to take about 30 minutes to just kind of walk through it and then.

226

00:23:41.910 --> 00:23:51.180

Stephanie Bogan: i'm actually pretty excited about this we're going to break into breakouts and we're going to put you in 16 rooms, I believe the team has organized so that we're in groups of no more than six.

227

00:23:51.480 --> 00:23:55.740

Stephanie Bogan: So we can actually have this you know micro conversations that we all seem to really enjoy.

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00:23:56.160 --> 00:24:03.720

Stephanie Bogan: And we're going to allow you to pick a different lesson and we're going to talk about what you have and will do so that's just what we'll cover this again.

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00:24:04.260 --> 00:24:13.350

Stephanie Bogan: But as we go through this I want you to think about where you are on each of these lessons so literally i'm just going to read through them.

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00:24:14.160 --> 00:24:23.430

Stephanie Bogan: talk very quickly Adam feel free to chime in but i'm just going to do the the High Level summary which is one science of success is that mastermind like what does it take.

231

00:24:23.760 --> 00:24:29.760

Stephanie Bogan: To be a happy top performer what I call high performance happiness, so this is just your foundation one On one level.



232

00:24:30.120 --> 00:24:41.340

Stephanie Bogan: In mindset and how your brain works if you skip this do not pass go do not collect \$200 do not do one more damn thing until you go back watch this lesson fill out the worksheet and find one.

233

00:24:41.670 --> 00:24:46.980

Stephanie Bogan: story that is standing between you and your next level of success there's nothing more valuable that you can do.

234

00:24:47.550 --> 00:25:01.080

Stephanie Bogan: It is always your stories holding you back Adam i'm just going to give you the opportunity to say something here, because you have set down so many stories like what is the outcome of this lesson that they should be thinking about from the you know from your in practice perspective.

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00:25:03.570 --> 00:25:05.520

Adam Cmejla: Be careful what you tell yourself because you're listening.

236

00:25:05.880 --> 00:25:17.100

Adam Cmejla: I think it's so important it's really, really, easy to get consumed with everything that we're talking about through this program and through all the work that you're doing as advisors and as leaders of your firm's.

237

00:25:17.490 --> 00:25:29.400

Adam Cmejla: that a lot of the things that we're talking about our new and because they're new they can seem uncomfortable and sometimes the biggest challenges just working on becoming comfortable with being uncomfortable because that's where the growth happens.

238

00:25:30.510 --> 00:25:38.280

Adam Cmejla: And it's really the stories that you start telling yourself and the justification for why it won't work or why shouldn't do this or.

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00:25:38.460 --> 00:25:45.750

Adam Cmejla: Why, I can't do that I can't charge this much I can't move these clients over here I can't increase my service model, like those are the justification that started happening.

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00:25:46.200 --> 00:25:52.350

Adam Cmejla: And you just have to be you I speaking for me i've never been able to stop those.

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00:25:52.710 --> 00:26:01.440

Adam Cmejla: i've tried to embrace something that I learned from John Asterix who's done a lot of work on the mental mindset side of things, and he talks about Ai right being aware.

242

00:26:01.800 --> 00:26:09.090



Adam Cmejla: of something that is inserted in your life right now okay so i'm aware of this feeling what's my intention here will my intention is to be.

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00:26:10.050 --> 00:26:23.700

Adam Cmejla: A responsible husband and father to my to my wife and my kids my intention is to lead a profitable and thriving practice right okay now, what are the actions that I need to do in order to realign the output, with the input.

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00:26:24.780 --> 00:26:30.780

Adam Cmejla: So a lot of this is just being aware, because it is drinking drink going through all this is drinking from the firehose and that's why.

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00:26:31.740 --> 00:26:39.180

Adam Cmejla: When steph and I were talking about this, I thought that we can use this opportunity as just that an opportunity to do to hit the pause button.

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00:26:39.720 --> 00:26:46.170

Adam Cmejla: And just have some real good conversations about not only just the what what we're doing the practice, but how you're showing up to work on that one.

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00:26:48.270 --> 00:26:52.350

Stephanie Bogan: So there is a if you have not gotten around something tangible here.

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00:26:52.710 --> 00:26:59.430

Stephanie Bogan: One awareness will carry you allies you hear us talking about it understand that their voices in your head they're not usually your friends.

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00:26:59.760 --> 00:27:09.720

Stephanie Bogan: and your job is to literally reframe them so that you literally get up and you're like i'm awesome I can do this I am empowered can do everything is figure out about that is that success state.

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00:27:10.200 --> 00:27:21.990

Stephanie Bogan: We talked about it's an actual state that your brain learns to operate in the same way that your brain gets conditioned to upgrade and stress or trauma or anxiety or fear or uncertainty or doubt or imposter syndrome.

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00:27:22.380 --> 00:27:28.470

Stephanie Bogan: Those are the things that ultimately keep you from getting clarity when you're stuck and you're like I don't know what to do next it's.

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00:27:28.770 --> 00:27:36.330

Stephanie Bogan: you've all picked something and done something before you could pick anything on this page and go do it, which is what they did in year one there was zero map.



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00:27:36.750 --> 00:27:43.650

Stephanie Bogan: And that, then they pick something else in right, and then you start to get a feel for it now you have a lot more guys than that and, as a shared we're adding.

254

00:27:44.250 --> 00:27:52.140

Stephanie Bogan: Lisa and I just met this morning, a couple more clarity and accountability calls to make sure we have that room for you to go to to really have me help you work through it.

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00:27:52.710 --> 00:28:00.510

Stephanie Bogan: But the science of success is about exactly what Adam said it's understanding that thoughts are what drive you forward.

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00:28:00.870 --> 00:28:07.980

Stephanie Bogan: Your belief in yourself is your greatest currency, and there are those invisible forces that tend to work against you.

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00:28:08.400 --> 00:28:18.720

Stephanie Bogan: I know that they exist because if they didn't you would be way beyond the next level of success that you're at right that's Our job is to figure out what standing between us and it so that's what this lessons for.

258

00:28:19.230 --> 00:28:27.120

Stephanie Bogan: Your vision for success we have talked a lot about this is the clarity, peace and clarity, transparency and accountability, it is coming up with this simple.

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00:28:27.480 --> 00:28:35.640

Stephanie Bogan: vision and why right, what is the outcome, I want to create for my practice in my life, why does that matter to me right.

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00:28:36.210 --> 00:28:43.170

Stephanie Bogan: And then, what is the business plan that will support you, creating that practice and life for yourself simple one page business plan.

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00:28:43.710 --> 00:28:52.830

Stephanie Bogan: The personal launch plan with the quarterly priorities we're going to do a tribe talk on managing projects and teams, I think, in June or July, a lot of you have asked me about that.

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00:28:53.160 --> 00:29:06.000

Stephanie Bogan: And there's very specific processes models and strategies, I can share that will help so be tuned for that, but this is really about getting clear on the what and the why so that you can build that one page business plan, which is what guides your year.

263



00:29:06.540 --> 00:29:17.010

Stephanie Bogan: My model practice is Adam and I did this lesson, where we literally go through that flywheel of answering the core questions, and that should give you what you are building that is your blueprint.

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00:29:18.000 --> 00:29:25.080

Stephanie Bogan: That should inform what lessons you do in what order if you're not just following along in the order of the curriculum.

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00:29:25.710 --> 00:29:30.270

Stephanie Bogan: The idea is, as you get to each retreat you're going to identify which lessons, you can do.

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00:29:31.050 --> 00:29:38.100

Stephanie Bogan: Right, as we get to each retreat like you're not going to do all four of the ones from last week at once right you're going to put those in the plan.

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00:29:38.820 --> 00:29:48.450

Stephanie Bogan: My model practice is what helps you identify what are the big levers that you can pull for Adam, if you remember it was right he knew really early on, with the clients, he did have he could raise fees.

268

00:29:48.900 --> 00:29:59.820

Stephanie Bogan: Right give himself a little bit more revenue minimums niches right, so you know surges all the lessons we've covered or those levers so just be thinking about where they fit in and then action and accountability.

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00:30:00.210 --> 00:30:08.730

Stephanie Bogan: Is it see the part we kind of missed but it's really important that's where you come up with the the business plan the personal launch plan that you use each quarter.

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00:30:09.090 --> 00:30:16.380

Stephanie Bogan: And whether it is a cocktail napkin a posted or the one page business plan it's about having something that you have written reference point.

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00:30:16.770 --> 00:30:22.080

Stephanie Bogan: That you look at on a regular basis right and power productivity is how you put all of that together.

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00:30:22.470 --> 00:30:27.960

Stephanie Bogan: If you haven't done some productivity hacks at this point if you're checking email 17 times a day.

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00:30:28.350 --> 00:30:33.150

Stephanie Bogan: This is the lesson, you want to make sure and reflect on because you should have some progress in that area.



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00:30:33.570 --> 00:30:41.280

Stephanie Bogan: So I'm going to pause there, because I know we've covered those and I don't want to spend a ton of time on them again, but I want to make sure that you're all grounded in what each of them are.

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00:30:42.060 --> 00:30:50.970

Stephanie Bogan: As you just take a moment and ask yourself, where do you have a check in the box in that like hey I've really gone through that I've done some good work and I've made some progress.

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00:30:51.390 --> 00:31:00.930

Stephanie Bogan: doesn't mean you can't do deeper or more work down the road, but in terms of what's your your first level of work and or have I not gotten to that is it something that I want to.

277

00:31:01.950 --> 00:31:11.070

Stephanie Bogan: And, or is it something that I'm not yet prioritizing right and it just goes in my list of things to review and I plan so that's a very practical process.

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00:31:12.660 --> 00:31:21.420

Stephanie Bogan: What I want you to think about is, what are the gaps, what is the next best step that you can take in any one of these, if you have not checked the box.

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00:31:21.930 --> 00:31:28.680

Stephanie Bogan: And Adam will share like Adam I know in your one you did what was it two or three or maybe four big things but.

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00:31:29.040 --> 00:31:38.340

Stephanie Bogan: The thing that exists in these lessons in particular the productivity in the action and accountability, and even in the ones we covered last because there's all these little things that you pick up along the way right one.

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00:31:38.670 --> 00:31:57.060

Stephanie Bogan: script question, I can use one quick way I can change an agenda, so I want you to also look at this road, through the lens of not have I done everything I can do, but have I picked up some wins made some progress can I check that box right is it a light check or a dark check, you can decide.

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00:31:58.650 --> 00:32:06.090

Stephanie Bogan: But I want you to evaluate that from clarity and accountability, because this is what drives everything else, this is what drives how you will apply your energy.

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00:32:06.960 --> 00:32:20.940

Stephanie Bogan: In what time you do it and that formula, ladies and gentlemen, determines to what effect, we talked about that in our last call right to what effect, are you focusing your time and energy, these are the lessons that do that.

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00:32:22.320 --> 00:32:30.000

Stephanie Bogan: So your outcome should be right, the worksheets and stories on science of success right clarity of the vision and why and your priorities.

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00:32:30.600 --> 00:32:40.920

Stephanie Bogan: In vision my model practice your one page flywheel like your your model practice power productivity, you should have picked some things to make yourself more productive your model schedule your calendar.

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00:32:41.190 --> 00:32:49.830

Stephanie Bogan: Stop checking email use your trusted assistant and action and accountability, you need accountability mechanisms, we now have the accountability room and tribe.

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00:32:50.430 --> 00:33:01.470

Stephanie Bogan: We have your mastermind pods we have coaching calls, we have office hours, so you should have accountability in place if you don't, please let me know so i'm going to pause there Adam anything you want to add to that.

288

00:33:02.550 --> 00:33:13.290

Adam Cmejla: You know I think the there's a phrase that i've that is trying to that i'm trying to use to guide 2021 for me, excuse me 2021 for me.

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00:33:13.890 --> 00:33:29.130

Adam Cmejla: And that's been it's kind of a two part phrase what am I solving for and who not how it gets me there So what is it and how you and how I think if I think back to my first trip around the limitless blocks, so to speak, back in.

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00:33:30.690 --> 00:33:39.900

Adam Cmejla: The biggest disconnect that I had right was the top line revenue of what the firm was doing and I looked at Okay, so what am I solving for all i'm solving for the.

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00:33:40.200 --> 00:33:51.390

Adam Cmejla: For the metrics in my practice and you just you just keep asking that question, as you distill down to figure out what is the first domino that needs to fall in your practice to best solve.

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00:33:51.990 --> 00:34:09.930

Adam Cmejla: That problem right, what are you solving for and then understanding that as an advisor everything that's on this list, right here you're not going to be the one solving 100% of the action items that are necessary to solve those so you ask yourself who not how gets me there I heard.

293

00:34:11.580 --> 00:34:16.110

Adam Cmejla: I don't know if it was in the chat or in tribe or or somewhere, someone said.

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00:34:16.620 --> 00:34:23.880

Adam Cmejla: gosh I wish I would have known that the price of admission for tuition or the price of admission intuition for limitless is just going to be the beginning of the checkbook because.

295

00:34:24.180 --> 00:34:25.860

Adam Cmejla: i'm now realizing that I need to.

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00:34:26.100 --> 00:34:38.220

Adam Cmejla: spend money on a graphic designer and then you spend money on a website and you to spend money on this, and this is a yes, but I would refrain that and say that you don't have to spend the money you're making an investment in your brand you're making an investment in your.

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00:34:38.580 --> 00:34:45.300

Adam Cmejla: In your firm and in yourself right just depending on which which one of the sandbox is that you're working on right now.

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00:34:45.720 --> 00:34:54.480

Adam Cmejla: view that as what what investment do I have to make, and who not how do I solve that because the one thing that we still always must.

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00:34:54.960 --> 00:35:03.930

Adam Cmejla: must remember is that we all still only have 168 hours in a week and so how you're using those is largely going to dictate the return on.

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00:35:04.620 --> 00:35:08.670

Adam Cmejla: Time and returned us the return on life that you get which.

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00:35:09.120 --> 00:35:19.200

Adam Cmejla: None of us like to be busy none of us like to be stressed, so just keep that in mind as you're looking through these things you're not going to do everything at once, and some of these things candidly as we're looking on this on the screen here right, some of them do.

302

00:35:20.400 --> 00:35:23.910

Adam Cmejla: They overlap, but then, but one begets another right so.

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00:35:25.440 --> 00:35:26.130

Adam Cmejla: chunk it down.

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00:35:26.250 --> 00:35:28.110

Adam Cmejla: And was a big rock that you need to move.

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00:35:28.410 --> 00:35:39.210

Stephanie Bogan: yeah, especially as you get to that last plane which we'll talk about so I want to highlight something that Adam said, and the way that I would articulate it is that investment proceeds return always.

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00:35:40.080 --> 00:35:47.820

Stephanie Bogan: So yes, you are going to make choices, where you're going to make additional investments that's a choice you don't have to you do not have to spend a dime.

307

00:35:48.390 --> 00:35:56.610

Stephanie Bogan: I cannot change the laws of human nature, which is that people don't like ugly design so it's better for your marketing and your branding if things look pretty.

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00:35:56.940 --> 00:36:10.230

Stephanie Bogan: But I can tell you, people have done okay with really bad looking stuff right because they're out there they're telling the story with passion and commitment, if you guys go back and look at our year one website, it was a rainmaker website that Lisa put together.

309

00:36:11.550 --> 00:36:20.190

Stephanie Bogan: And I loved the feel of it and didn't really like anything else, but that was not the priority when we started, you know how much money, I made with that rainmaker website.

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00:36:21.300 --> 00:36:29.940

Stephanie Bogan: Gross \$4 million that in webinars and then in year four, I was like okay we're clear now it's time to drop some money on a website.

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00:36:30.810 --> 00:36:36.690

Stephanie Bogan: So I want you like you don't have to get to perfect, but you will make investments of time and capital.

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00:36:37.110 --> 00:36:44.520

Stephanie Bogan: What we want to help you do here is figure out which levers to pull in what order so that you get the lyft so that you can then build on that.

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00:36:44.880 --> 00:36:55.350

Stephanie Bogan: get a little bit more lyft and build on that right do not go do 10 things at once with external partners, because the odds, that you can absorb them and integrate them quickly enough to get the value.

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00:36:55.710 --> 00:37:04.770

Stephanie Bogan: are not necessarily high so just yes you're going to make investments be thoughtful about the ones that you make and make sure you execute fully otherwise there's not going to be a ton of value in it.

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00:37:05.640 --> 00:37:17.430

Stephanie Bogan: The second thing I want to add is, which relates to this overall is that when you look at this and you



get into that state of overwhelm and I think Adam put it in a way that I just want to hit back on where we started, which is.

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00:37:18.000 --> 00:37:25.350

Stephanie Bogan: Your brain only goes into overwhelm because you're telling yourself a story about the event that is happening and it's usually not a good outcome for you.

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00:37:25.860 --> 00:37:37.140

Stephanie Bogan: But I want you to learn to challenge that that conditioned response and that question because at the end of the day, overwhelm is a form of because I wrote this down when I was talking have to, or should.

318

00:37:37.590 --> 00:37:44.580

Stephanie Bogan: I have to get this done a certain way, I should have this done by now Adam did this somebody else did that right all those forms of comparison and judgment.

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00:37:45.000 --> 00:37:50.490

Stephanie Bogan: it's about getting clear on that next best step which we're going to talk about so just understand that one.

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00:37:51.180 --> 00:38:02.250

Stephanie Bogan: it's not about feeling overwhelmed it's about turning that overwhelm into an organized plan Adam will tell you make, maybe, how many big things did you do in your one atom like big projects.

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00:38:03.780 --> 00:38:04.410

Stephanie Bogan: If you remember.

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00:38:04.590 --> 00:38:08.460

Adam Cmejla: One day, I mean raise your fees.

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00:38:08.790 --> 00:38:16.530

Adam Cmejla: yeah trickle down into the net trickle down into like good service model, a little bit, but that's like the biggest one that moves the needle the most.

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00:38:16.860 --> 00:38:19.920

Stephanie Bogan: yeah and then Nick did you you narrow your niche in year one or year to.

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00:38:20.610 --> 00:38:29.460

Adam Cmejla: I had gotten the momentum going in late being kind of early 2019 that actually burn the ships like 2019 okay.

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00:38:29.490 --> 00:38:38.970



Stephanie Bogan: So started at the end of year one so that's a good segue into nailing your niche if you have not checked this box, or at least narrow the guardrails and have a.

327

00:38:39.210 --> 00:38:48.420

Stephanie Bogan: direction that you feel confident about do not pass go do not collect \$200 right take your mindset worksheet and you're nailing your niche worksheets put them together and sold, this first.

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00:38:48.810 --> 00:38:57.360

Stephanie Bogan: and foremost because everything else is built on it that's how you get the magic sauce even if you're one of those people that staying general in your practice.

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00:38:57.630 --> 00:39:10.230

Stephanie Bogan: Getting clear on this sub segments, so that you can add those specialized services in an automated way is what's going to allow you to still get a lot of the lift just not as much as a pure niche, but you can still do incredibly well.

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00:39:10.860 --> 00:39:17.130

Stephanie Bogan: So you should have a niche or a more clearly defined target market that you feel comfortable building your service model.

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00:39:17.490 --> 00:39:22.740

Stephanie Bogan: and your marketing around like that should be the outcome of this lesson, if you don't what's that next best step.

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00:39:23.310 --> 00:39:37.590

Stephanie Bogan: Telling your story is we've talked a lot about this, but you should have the story at this point, you should feel comfortable with it, if you don't that is your next best step right, so these things build on each other and then, as we talked about with Adam finding your fee model.

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00:39:38.820 --> 00:39:47.790

Stephanie Bogan: Right, this is the first thing for you, if you have that too much for too many for too long, even before niche, for example, because the.

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00:39:48.240 --> 00:39:55.350

Stephanie Bogan: You want to create as much opportunity and lift out of the current situation right without extra energy, you can go to clients and say.

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00:39:56.100 --> 00:40:07.050

Stephanie Bogan: You know I realize it's actually fair me today I just wrote an article about this for an investment news, not on, are you ready for this not on how it's okay to let go of unprofitable clients, I thought i'd raised the bar I wrote an article.

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00:40:07.410 --> 00:40:14.850



Stephanie Bogan: on how it's totally okay to let go of profitable clients, courtesy of my coaching with tanya right that's raising the bar on.

337

00:40:15.120 --> 00:40:22.200

Stephanie Bogan: You are entitled, as an advisor to raise your fees, with time and experience and value like lawyers and doctors and everyone else, so this stigma.

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00:40:22.500 --> 00:40:27.120

Stephanie Bogan: That, if we do we're bad and we're like it's just not good for the clients or the business or the stakeholders.

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00:40:27.600 --> 00:40:32.910

Stephanie Bogan: So if you have clients that are on, you know that you're over servicing or your undercharging.

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00:40:33.420 --> 00:40:45.930

Stephanie Bogan: that's step one like let's get clear on the service model and the profitability that goes with that and then adjust the fees accordingly Adam anything you want to say about this sort of the communicating your value lane.

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00:40:46.620 --> 00:40:48.360

Adam Cmejla: Now I think we're good okay.

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00:40:48.900 --> 00:40:58.620

Stephanie Bogan: All right, delivery deliver massive value so we just went through these lessons one page plan goals based review amazing first meeting five star service system and client meeting searches.

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00:40:59.070 --> 00:41:08.040

Stephanie Bogan: one page plan goals based review and amazing first meeting or what we put in the La Perle Richard school of advice and to Adams point earlier they're pretty integrated.

344

00:41:08.670 --> 00:41:18.960

Stephanie Bogan: Right, so the one page plan is a lesson, but you use it in the amazing first meeting and in the goals based review, but the lesson is really about the concept and how to use a one page plan.

345

00:41:19.350 --> 00:41:26.340

Stephanie Bogan: How to move in that direction if you're just going to start with some questions and then goals based review and amazing first meeting or the structural essence on.

346

00:41:26.700 --> 00:41:29.880

Stephanie Bogan: How to build your review meeting and how to build your discovery meeting.

347

00:41:30.780 --> 00:41:39.360



Stephanie Bogan: So if those are in your priority queue like I don't think some of you will have those checked off because you've done them, but the rest of you will just be deciding where those go.

348

00:41:39.870 --> 00:41:46.080

Stephanie Bogan: In the levers that you pull going back to the conversation of what's going to create the next lift in terms of time or revenue.

349

00:41:46.530 --> 00:41:54.270

Stephanie Bogan: you're in different places, so some of you are in a more clients you're a little bit larger and more complications, so your lift might be time to begin with.

350

00:41:54.750 --> 00:41:57.030

Stephanie Bogan: Right your focus there is time and simplification.

351

00:41:57.300 --> 00:42:06.000

Stephanie Bogan: that's where you're going to be on standards and systems and service models and searches like deal with what you've got before you spend a lot of energy growing it because you don't want to double what you've got.

352

00:42:06.510 --> 00:42:16.230

Stephanie Bogan: If you're in the growth mode, then you really want to make sure you've got the niche and the story and the fees and and right the ability to communicate package that in that say yes prospect.

353

00:42:16.590 --> 00:42:22.320

Stephanie Bogan: that's a priority, and then you obviously want to do things that will help you continue to find new clients to grow.

354

00:42:23.070 --> 00:42:31.920

Stephanie Bogan: Which we're always talking about so that is the overview, so I really I know we've talked about these we talked about them all the time, but I really wanted to take you through.

355

00:42:32.430 --> 00:42:43.380

Stephanie Bogan: A grounding is we literally hit the halfway point this year you've covered a lot that's a really good thing because here's what it means, ladies and gentlemen, this is your capability deck.

356

00:42:44.100 --> 00:42:51.240

Stephanie Bogan: Do you know this is so valuable in terms of having that master model to draw from for that limitless practice like it's here.

357

00:42:51.810 --> 00:43:04.680

Stephanie Bogan: Now, your job is to not get tricked into thinking that you have to solve it all right now right and figure out what's that next best step so that's what we're going to go into the breakouts to talk about, which is what are your biggest gaps.



358

00:43:05.700 --> 00:43:20.820

Stephanie Bogan: So we're going to talk a little bit about this now what priorities will have the biggest impact in the near term what's your next best step, and this is the one that almost never happens asked me team how annoying I am allison are you on the phone.

359

00:43:21.960 --> 00:43:25.590

Stephanie Bogan: What were we talking about this team's weekly huddle this morning's weekly huddle.

360

00:43:25.980 --> 00:43:27.420

Allison Foulk: We always capture our next step.

361

00:43:27.840 --> 00:43:34.260

Stephanie Bogan: let's get there's where and i'm like where's my calendar if it's not on my calendar it doesn't exist, you can't have a task floating and you can't have it on the.

362

00:43:34.560 --> 00:43:45.060

Stephanie Bogan: On the asana board but not have it on my schedule that doesn't get things done right so i'm constantly like linking the dominoes linking the dominoes and the first step, always is get clear.

363

00:43:46.140 --> 00:43:50.430

Stephanie Bogan: Right get focused and then get to work and get to work means put time on your calendar.

364

00:43:51.510 --> 00:44:02.610

Stephanie Bogan: So Adam and I talked about this in the prep call, and these were the questions that we really wanted to encourage you to ask so i'm going to let Adam you Adam you want to kind of take them through this from the advisors perspective.

365

00:44:04.020 --> 00:44:12.510

Adam Cmejla: yeah it kind of comes back to what I was talking about earlier right, the more shiny objects that we see, and the more we get into this program or any for like it.

366

00:44:12.960 --> 00:44:23.940

Adam Cmejla: Whether you're doing a workout or your it doesn't matter what new thing that you put into your life right you always have to understand and think about the this idea that with every new thing that you put in your calendar.

367

00:44:24.330 --> 00:44:31.710

Adam Cmejla: You are going to be saying no to something else, already in your life, the challenges are you aware right going back to that Ai right, are you aware.

368

00:44:32.100 --> 00:44:41.790



Adam Cmejla: of that law, are you aware, still that with 168 hours for every new thing that you feel like doing because of this program that you are inspired to take action on because of this program.

369

00:44:42.450 --> 00:44:52.350

Adam Cmejla: we're aware that that's going to take time so Okay, so what is my intention with that well my intention is to get the best Roi of this practice or of this program and that's my time.

370

00:44:52.560 --> 00:44:58.170

Adam Cmejla: Okay, so, then what actions do I need to take in order to align my intentions with my actions and so.

371

00:44:58.530 --> 00:45:06.090

Adam Cmejla: When you think about how you're budgeting, this time, what is it that you're going to say no to in your life, what are you going to say no to on your calendar right now.

372

00:45:06.330 --> 00:45:22.230

Adam Cmejla: so that you can take action on these items and that you can prioritize and organize all of the things that you have going on in your life, one of the biggest things that has had and what i'm about to say i'll give you the the disclaimer that I am.

373

00:45:24.060 --> 00:45:28.020

Adam Cmejla: I am the poster child for work in progress on one of them about to say here but.

374

00:45:28.470 --> 00:45:33.840

Adam Cmejla: With that I I haven't made a lot of progress with the program it's it's David allen's getting things done right.

375

00:45:34.230 --> 00:45:43.890

Adam Cmejla: it's understanding and taking that triage and you don't need to read the whole book to get to understand the concept hector's listen to this podcast to the gtd podcasts just search that you can get a.

376

00:45:44.520 --> 00:45:51.990

Adam Cmejla: cliff notes in the in the breakdown of it there, but David allen's prouder of philosophy and theme, basically, is that LIFE has to have an inbox.

377

00:45:52.290 --> 00:46:01.110

Adam Cmejla: And you have to dedicate time to it when I say inbox i'm talking about everything that is in my in your mind i'm not going to go again i'm not going to turn this into the gtd summit.

378

00:46:01.530 --> 00:46:11.430

Adam Cmejla: But basically, with what we're talking about here with what we've already talked about in the books or to see on this call, and what we're going to be talking about in the breakout rooms here.

379



00:46:11.820 --> 00:46:15.450

Adam Cmejla: it's not enough to just make sure it oh yeah I need to work on.

380

00:46:15.870 --> 00:46:26.850

Adam Cmejla: ABC be right that these five things, the next step to that is that what am I going to look on my calendar, where, am I going to find that time to dedicate la CP time.

381

00:46:27.240 --> 00:46:33.390

Adam Cmejla: if it's not scheduled on your calendar right what's the I have a kind of a come to Jesus phrase that I use with clients.

382

00:46:33.630 --> 00:46:42.270

Adam Cmejla: When we're talking about financial planning right show me your checkbook and i'll show you your priorities, and we can do the same thing here as well, we can say show me your checkbook and show me your calendar.

383

00:46:42.600 --> 00:46:47.610

Adam Cmejla: And i'll show you your priorities and some of the absence of taking it, the next step.

384

00:46:48.210 --> 00:46:56.220

Adam Cmejla: After these after these breakout sessions, and you identify what's the next best step or to channel my inner ear right what's the next right thing.

385

00:46:56.700 --> 00:47:03.300

Adam Cmejla: That I need to do any frozen to me any any advisors you with kids that have played frozen to know what i'm talking about right here, and the frozen to.

386

00:47:03.990 --> 00:47:11.130

Adam Cmejla: what's the next right thing, the next best thing that you need to do in your practice, and you have to put it on your calendar and just be comfortable.

387

00:47:11.400 --> 00:47:18.360

Adam Cmejla: With what you're going to eliminate from that calendar hopefully it's not family time hopefully it's not free time.

388

00:47:18.750 --> 00:47:25.890

Adam Cmejla: Hopefully, what you're able to do is be surgical and be ruthless with your to do list on the calendar and figure out who not how.

389

00:47:26.580 --> 00:47:34.320

Adam Cmejla: can help you get there, and whether that means delegating tasks to a virtual va okay now reverse engineer that here's the next right thing that you.



390

00:47:34.620 --> 00:47:42.570

Adam Cmejla: need to do, maybe it's not working on this, maybe it's hiring a virtual assistant or a pair of planner or another advisor associate to you know.

391

00:47:43.110 --> 00:47:53.820

Adam Cmejla: Who can help that can help you move the needle you have you just have to budget that time because being brutally honest with everybody on the call here like i'm drowning I just came back from basically two weeks, out of the office.

392

00:47:54.600 --> 00:48:05.940

Adam Cmejla: And I look at my red tail I joked with Kathy when I came into the Office here today said, can I treat red tail like email right if I never actually check it but doesn't exist, it doesn't have to get done she didn't like that too much.

393

00:48:07.830 --> 00:48:13.830

Adam Cmejla: But, like you, where is that time going to come from and that's, the only thing that I want to make that I want to.

394

00:48:14.670 --> 00:48:24.000

Adam Cmejla: Seed in your mind as we break out into these next sessions is finished the drill and make sure that at the end of this call, and before we hang up.

395

00:48:24.510 --> 00:48:35.220

Adam Cmejla: That you block that time on the calendar, not just for the one next thing that you need to do, but again whether it's David Allen system or another another type of time slash project management system.

396

00:48:35.520 --> 00:48:39.570

Adam Cmejla: figure out how to get started with your time, because that is the greatest currency that we all have.

397

00:48:41.070 --> 00:48:49.740

Stephanie Bogan: And I want to actually take a moment to frame that for you guys in an actionable way, which is, if you look at limitless and sort of our.

398

00:48:50.130 --> 00:48:56.850

Stephanie Bogan: You know, coaching and curriculum personal and professional we're really covering for core areas So these are for swim lanes like to call them.

399

00:48:57.120 --> 00:49:05.010

Stephanie Bogan: That you can go through at any time so think about this so we're going to apply these four questions but we're going to go up a level to these four swim lanes one.

400

00:49:05.400 --> 00:49:23.040



Stephanie Bogan: mindset strategy clarity right like what am I doing Why am I doing it i'm in the right headspace right the clarity peace to value, all things clients advice right three productivity right systems personal like how do I make this thing hyper efficient and for growth.

401

00:49:24.270 --> 00:49:34.500

Stephanie Bogan: So, as you look at where can I write the big levers worksheet has different things in different categories, but if you think about those four swim lanes what's the biggest resistance point.

402

00:49:34.950 --> 00:49:46.230

Stephanie Bogan: For you right now is it just getting clarity and you know not feeling of like just knowing what you need to do, and having that sense of purpose and commitment and right you're on track to do it because that's a really big deal if you.

403

00:49:46.530 --> 00:49:52.740

Stephanie Bogan: Try to do the other three swim lanes from that place it's going to be really effortful effortful and not terribly efficient and productive.

404

00:49:53.220 --> 00:50:09.720

Stephanie Bogan: If it's around delivering more value to clients like hey you know i've really got to sort that out and get a sense like okay focus there so think about the swim lanes mindset strategy right value productivity and growth, where are your biggest gaps in each area.

405

00:50:14.100 --> 00:50:21.480

Stephanie Bogan: What priorities in each swim lane will have the biggest impact right in the near term.

406

00:50:21.960 --> 00:50:29.130

Stephanie Bogan: If you're at long term, let me know when we can have that conversation most of you are still at like what's going to have the biggest impact in the next three to 12 months.

407

00:50:29.610 --> 00:50:35.430

Stephanie Bogan: And then, based on that, if the biggest impact if you're in the the productivity lane and you're like wow.

408

00:50:35.760 --> 00:50:44.220

Stephanie Bogan: We have revenue, but we're just you know we're not running like that oiled machines right so step one is i'm going to be in the productivity lane, what are the biggest gaps, you know what.

409

00:50:44.640 --> 00:50:52.380

Stephanie Bogan: Things to start coming in a consistent basis here okay what priorities will have the biggest impact of the near term service model searches.

410

00:50:53.010 --> 00:51:00.180

Stephanie Bogan: Great what's the next best step, so do you see how I went from just this where, where do I need to



focus my energy.

411

00:51:00.720 --> 00:51:08.670

Stephanie Bogan: and attention mindset strategy value productivity or growth and then where my gaps, it becomes a lot easier with that frame.

412

00:51:09.390 --> 00:51:19.350

Stephanie Bogan: What are my priorities what's my next step and then as Adam pointed out how do I put time on the calendar for that, if it is not on your calendar you show me your calendar, I will show you your priorities.

413

00:51:19.980 --> 00:51:27.960

Stephanie Bogan: Right, the problem is it doesn't say in your calendar check email 27 times and be unproductive today so it's not like a true representation of your daily dashboard.

414

00:51:29.220 --> 00:51:40.140

Stephanie Bogan: But if we showed your real calendar like we would see where half of your time, energy and money is going and we'd be able to remove that so I want you to get really clear about where you want to focus as we go into these next sessions.

415

00:51:40.950 --> 00:51:46.530

Stephanie Bogan: Because we are going to give you these options So these are really about the delivering massive value breakouts.

416

00:51:47.250 --> 00:51:52.530

Stephanie Bogan: And what we want you to do is go into these breakouts pick one of the four topics above.

417

00:51:53.430 --> 00:52:08.700

Stephanie Bogan: And you're going to go through what we call it, I have an and I will exercise, so this is just a clarifying exercise for your brain that we use in coaching I have, which is started asking what like I have done what I have what's a win.

418

00:52:10.200 --> 00:52:14.460

Stephanie Bogan: Right Aaron I have, what do you have a win that you can share with us from this year.

419

00:52:17.340 --> 00:52:19.200

Stephanie Bogan: One I know you're selling spot right now.

420

00:52:19.830 --> 00:52:20.160

Erin Egesdal: uh huh.

421

00:52:20.310 --> 00:52:23.250



Erin Egesdal: I know do yeah I feel like i've.

422

00:52:26.160 --> 00:52:30.510

Erin Egesdal: clarified the relationship with my dad in the six part of the succession plan okay.

423

00:52:30.840 --> 00:52:37.380

Stephanie Bogan: So does a big deal for you right yeah right Okay, so I, this is what i've done this, is the value it's had, and then I will.

424

00:52:37.590 --> 00:52:44.010

Stephanie Bogan: Like what's an I will, as you look at these sessions if it's something else it's critical to you that's totally Okay, we want to give you a structure.

425

00:52:44.820 --> 00:52:50.730

Stephanie Bogan: Because even if you're not implementing these, and this is the point or even if you're not implementing all of these lessons right now.

426

00:52:51.090 --> 00:53:02.070

Stephanie Bogan: there's a near term benefit for you Aaron like hey and the prospect process, even though that might not be my priority in the next six weeks, there are three really good questions I could start using just to see how that works.

427

00:53:02.580 --> 00:53:09.990

Stephanie Bogan: Right or i'm going to just try and use a one page plan with that client that I really love his super warm and fuzzy just what that one just going to see how it works.

428

00:53:10.380 --> 00:53:20.250

Stephanie Bogan: Without reengineering an entire process, so I want you all to think about what is either, and I will, if you're committing to one of these lessons I will complete client meeting surges this quarter.

429

00:53:20.820 --> 00:53:30.450

Stephanie Bogan: Right or I will you know you know I will implement that news, you know what's one near term thing that you can do to get to extract some value from these lessons.

430

00:53:30.780 --> 00:53:42.480

Stephanie Bogan: As you go because I want to teach you guys that you can pull those little wins, and if you ask Adam and the other coaches all those little wins over the course of the year that just dropped out of coaching calls or office hours around tribe.

431

00:53:42.960 --> 00:53:55.800

Stephanie Bogan: Those if you add them up are so valuable and I want to make sure that you're always looking for those even if you're not right like that's a skill you're teaching yourself, can I see the big picture here while still extracting the near term value does that make sense.



765

01:36:11.970 --> 01:36:21.450

Stephanie Bogan: All right, well how we're how are those conversations I know the rooms, that I dropped in you guys were actually having great conversations about your hands and your wheels I heard loads of sharing.

766

01:36:21.900 --> 01:36:27.750

Stephanie Bogan: And question asking was that was that true Adam in the rooms that you jumped in or was it just my my awesome presence.

767

01:36:29.070 --> 01:36:29.640

Like just getting.

768

01:36:31.800 --> 01:36:33.000

Stephanie Bogan: out and talking you're muted.

769

01:36:34.800 --> 01:36:36.810

Adam Cmejla: i'm muted it's like this is my first zoom meeting.

770

01:36:38.220 --> 01:36:39.510

Adam Cmejla: No good conversations.

771

01:36:39.570 --> 01:36:40.470

Adam Cmejla: really good conversation.

772

01:36:41.370 --> 01:36:49.650

Stephanie Bogan: Right, so I was really glad I won't lie a little bit worried there after the zoom stuff we plan we organized and i'm always ahead of the tech on the ways that I want it to work.

773

01:36:50.130 --> 01:36:57.780

Stephanie Bogan: So we'll work on making that a little bit more seamless process, it should just pop up, you should see a screen and get to pick a room or didn't quite work that way but.

774

01:36:58.230 --> 01:37:05.520

Stephanie Bogan: As we went into the rooms you guys picked right up to your credit it's not about the tech or the zoom it's about the conversations and I was stuck because you were having.

775

01:37:05.910 --> 01:37:14.880

Stephanie Bogan: Really, and they were all different right one person was sharing about email and other were sharing about their surges there was sharing about regular she's with so there's lots of good stuff there.

776



01:37:15.420 --> 01:37:29.520

Stephanie Bogan: Alright, so the question is, what are you going to do with it from here so Adam and I when we kind of prep for this talked about things we wanted, and I think we've talked about each of these, but one understand that there's a difference between importance in are important and urgent.

777

01:37:30.810 --> 01:37:45.210

Stephanie Bogan: So always your goal a difference between a project and a task you know, create a launch plan for tasks great you have priorities those priorities have tests so get clear on the priorities right simplify grow.

778

01:37:45.630 --> 01:37:49.860

Stephanie Bogan: You know growth revenue 15% right, then the tasks become easier.

779

01:37:50.280 --> 01:37:59.940

Stephanie Bogan: And remember, it must always always always come back to your schedule and your calendar, because you have to show us your budget right, whatever your calendar says, that is what your priorities are.

780

01:38:00.510 --> 01:38:09.810

Stephanie Bogan: So what we wanted to do was based on some of those conversations, make sure that you all were clear focused and ready to work on what comes next as we focus on.

781

01:38:10.140 --> 01:38:18.240

Stephanie Bogan: we're hitting June we'll be wrapping up this quarter in these lessons and then in mid July, we will do the productivity retreat and.

782

01:38:19.290 --> 01:38:32.160

Stephanie Bogan: finalizing dates and locations on the the mini makeup retreats which we're very excited about so that will be coming later this week so who has a hot seat anybody want to hold themselves accountable need to get clarity.

783

01:38:33.930 --> 01:38:42.840

Stephanie Bogan: I know I just as an open ended question to like 80 people like what are the I said anyone actually raises their hand, so I am going to coach myself and say we have to ask a more specific question.

784

01:38:43.650 --> 01:39:01.410

Stephanie Bogan: As you come out of those masterminds do you have a specific next priority and best step, either on a current lesson or on something else that you are focused on right now, if you can drop in the chat what your I will is.

785

01:39:03.930 --> 01:39:11.130

Stephanie Bogan: i'm going to be looking at them and then i'm going to challenge each of you to drop those in tribe in the new accountability room.

786

01:39:11.520 --> 01:39:17.790

Stephanie Bogan: And I will be going in there, as I have anyone who's posted in the accountability room now has me



holding them accountable, by the way.

787

01:39:18.630 --> 01:39:28.350

Stephanie Bogan: So if you want to be held accountable go into the accountability room and just drop, whatever the lesson is or something from today's call and we will make sure the team, and I will do check ins and keep you accountable.

788

01:39:30.030 --> 01:39:39.510

Stephanie Bogan: I will restrict my sales process, I will complete my prospect process by June 15 I will make a video and publish it by June 30 I will schedule time with my assistant to offload more tasks.

789

01:39:40.110 --> 01:39:46.710

Stephanie Bogan: I will review the value lessons incorporate them into my priority plan alright so i've loved you guys see the clarity that you have, at this moment.

790

01:39:48.660 --> 01:39:52.650

Stephanie Bogan: Now, how do you feel at this moment overwhelmed or empowered.

791

01:39:55.260 --> 01:40:07.380

Stephanie Bogan: If you still feel overwhelmed which will happen from time to time, this is the time for you to let me know so that I can personally make sure that you get the clarity that you need to get focused and get to work.

792

01:40:08.280 --> 01:40:23.100

Stephanie Bogan: So all these conversations lead up to this right launch plans and this conversation absolutely should be a framework to help you and I just hear so much that clarity for all of you so who among you does not anyone have clarity that wants to walk through a hot seat with Adam and I.

793

01:40:24.870 --> 01:40:28.350

Stephanie Bogan: matt do you have clarity after last stephens after a breakout.

794

01:40:30.240 --> 01:40:31.260

Matt Stephens: Right, yes, I believe I do.

795

01:40:31.560 --> 01:40:32.040

Stephanie Bogan: All right.

796

01:40:33.480 --> 01:40:35.940

Mike Rauth: hey stephanie i'll i'll volunteer.

797

01:40:36.300 --> 01:40:39.150

Stephanie Bogan: Excellent who I just got to check my speaker view.



798

01:40:39.660 --> 01:40:41.580

Stephanie Bogan: Mike hey Mike how are you.

799

01:40:42.150 --> 01:40:42.810

Mike Rauth: i'm okay.

800

01:40:43.350 --> 01:40:45.030

Stephanie Bogan: All right, you have Adam and I.

801

01:40:47.250 --> 01:40:51.180

Mike Rauth: So yeah I actually reached out you had.

802

01:40:53.400 --> 01:40:56.400

Mike Rauth: In the tribe jumped on some stuff that I had.

803

01:40:57.870 --> 01:41:03.810

Mike Rauth: put out there before and said hey you need to pair this down and focus on something and and you know you're right, of course, and.

804

01:41:05.190 --> 01:41:09.960

Mike Rauth: I got i'm a little overwhelmed and a little confused so i'm very much where matt was.

805

01:41:10.980 --> 01:41:11.610

Mike Rauth: The other day.

806

01:41:12.630 --> 01:41:21.300

Mike Rauth: In terms of trying to figure out what the next step is and there's a lot of stuff that's all feels very interconnected to me and i'm not sure.

807

01:41:22.380 --> 01:41:25.050

Mike Rauth: But i'm not sure how to summarize it either here.

808

01:41:25.920 --> 01:41:34.290

Stephanie Bogan: So let's just start with some very simple questions like i'm literally just going to go through the questions we went through i'm not even going to pull out the big coaching stuff right like so one when you think about this for swim lanes.

809

01:41:34.680 --> 01:41:43.380

Stephanie Bogan: Strategy mindset value productivity growth is there, one of them, that really, really, in terms of the



outcome, you want to handle next what what resonates with you.

810

01:41:43.890 --> 01:41:45.420

Mike Rauth: yeah value for sure okay.

811

01:41:45.720 --> 01:41:51.540

Stephanie Bogan: So what's the biggest gap or biggest gaps, if you can list them quickly around delivering value to clients.

812

01:41:52.980 --> 01:42:06.090

Mike Rauth: So I feel pretty good about my first year process, but when I get into the ongoing annual review process I think that's extremely vague not clear not documented and I really want to up the value there.

813

01:42:07.200 --> 01:42:10.050

Mike Rauth: I thought it was systematized but I need to figure that out before I system.

814

01:42:10.860 --> 01:42:17.070

Stephanie Bogan: yeah I mean Adam this you can ask some questions this district pretty straightforward Mike which is step one is your service model.

815

01:42:17.880 --> 01:42:29.610

Stephanie Bogan: Now you can't define your service model to the to the standard, you can define it, ideally, you have a niche as you go into it, so that would be like my first question, do you have a defined niche or a general practice that you're kind of using guard rails around.

816

01:42:30.150 --> 01:42:32.310

Mike Rauth: yeah I do so, I mean my.

817

01:42:32.430 --> 01:42:33.450

Stephanie Bogan: realtors right.

818

01:42:34.110 --> 01:42:35.100

Mike Rauth: No i'm.

819

01:42:35.640 --> 01:42:44.730

Mike Rauth: i'm i'm retirees plus or minus three years of retirement and i'm an rsvp and I focus on developing income solutions for people.

820

01:42:45.030 --> 01:42:45.240

Okay.



821

01:42:46.470 --> 01:42:49.920

Stephanie Bogan: So retirement income planning right, so you know you know how to build a story around that.

822

01:42:50.820 --> 01:42:56.940

Stephanie Bogan: Right you've got the niche so it's the service like your service model is first Adam do you have like thoughts that are Chris really it's just.

823

01:42:57.210 --> 01:43:02.940

Stephanie Bogan: Who are the clients within that what are the things they get with what frequency and then you can add the specialized layer

824

01:43:03.390 --> 01:43:10.950

Stephanie Bogan: But to me if you've got those other pieces service model is because, in order to stand a standardized and automate you have to define what your standardizing and automating.

825

01:43:12.300 --> 01:43:22.500

Stephanie Bogan: And that's the up level opportunity is what are you doing now and then, what do you want to be doing understanding that you will move into that autumn great the standardization and the system ization is.

826

01:43:22.890 --> 01:43:27.450

Stephanie Bogan: For any of you doing service money you've got your standard level right what are things that all clients get.

827

01:43:27.930 --> 01:43:33.690

Stephanie Bogan: Your specialized level in this case for tyrese right, and how does that apply, and then the third level would be.

828

01:43:34.080 --> 01:43:44.040

Stephanie Bogan: personalized to the client right, what are the smiths going through etc, and you can you can build your service model, this first two layers of the easiest right, then you get the system going, and then you can add in.

829

01:43:44.550 --> 01:43:49.560

Stephanie Bogan: You know all the extra stuff the quarterly value adds but you're going to want to start with how many meetings.

830

01:43:50.010 --> 01:44:01.230

Stephanie Bogan: How many checking calls right, what are you doing in those meetings and then, when you go back through that service lesson for any of you there's lots of details around right the hundred different things, you can do and quarterly value ads and.

831

01:44:01.950 --> 01:44:07.380

Stephanie Bogan: All of that Adam anything you want to add to that for Mike in terms of just what might help him



with priorities.

832

01:44:07.770 --> 01:44:15.600

Adam Cmejla: yeah how many meetings are you having right now Mike how many meetings so you're not forget onboarding existing clients what's your what's your meeting schedule look like.

833

01:44:16.050 --> 01:44:21.960

Mike Rauth: Right, so I don't I don't I don't have a defined a meeting schedule it's very much client driven.

834

01:44:23.430 --> 01:44:29.970

Mike Rauth: You know so some clients it's three four times a year some clients it's once every 18 months because they just don't respond so.

835

01:44:30.180 --> 01:44:38.130

Adam Cmejla: Okay, so that can go down to 212 at the Max, especially if you're working with retirees it's an easy one, where you should be meeting with them to twice a year Max.

836

01:44:38.370 --> 01:44:39.060

Mike Rauth: yeah that's my go.

837

01:44:39.720 --> 01:44:43.380

Adam Cmejla: Go so go through the search course that are the search.

838

01:44:44.820 --> 01:44:47.430

Adam Cmejla: Half course trail whatever you want to call.

839

01:44:49.710 --> 01:44:52.950

Adam Cmejla: It because there's there's there's coaching in there on how to.

840

01:44:53.400 --> 01:45:02.340

Adam Cmejla: coach your clients on what you're going to be doing what and why you're doing it, why it benefits them right all of the messaging that you do to your clients is not how this benefits you, but how it benefits them.

841

01:45:02.790 --> 01:45:12.990

Adam Cmejla: So, to be more proactive and calculated in the service that we deliver to you, we want to let you know that we're changing up our service model for our existing clients, we are now going to be meeting clients in May to go over tax planning.

842

01:45:13.320 --> 01:45:26.820

Adam Cmejla: And in October to go over this and then in between that time it's your value ads right in January, it can be an insurance review in February, can be identity theft in March, it can be tax, or a 1099 letter in.



843

01:45:27.630 --> 01:45:37.770

Adam Cmejla: April or you know outside of surge, then you could do beneficiary review, I mean you can do six value adds in between your scheduled meetings.

844

01:45:38.070 --> 01:45:45.990

Adam Cmejla: That can be to what stephanie said that that next level right they can be something that can be provided to your next level clients.

845

01:45:46.230 --> 01:45:56.580

Adam Cmejla: That is still scalable at nature utilizing active campaign or convert kit or mailchimp or constant contact right, you can, and this is where you and I talked about in the breakout room.

846

01:45:57.360 --> 01:46:09.030

Adam Cmejla: If i'm distilling all this down, maybe i'm not sure where this is in your radar it sounds like a problem behind the problem here is finding someone to help you with this stuff because this is not the best and most effective use of your time correct.

847

01:46:10.290 --> 01:46:11.910

Mike Rauth: Absolutely okay.

848

01:46:12.360 --> 01:46:20.850

Adam Cmejla: So what's that what's that path to bring a team Member and either and apart or or permanent capacity to to serve your clients and it's going to ask me.

849

01:46:22.740 --> 01:46:34.230

Mike Rauth: yeah again, so this is where i'm you know I get kind of wrapped around the axle in terms of what's the next best step is it you know, working on the value piece, or is it go and find somebody helped me work on the value piece and systematized it so.

850

01:46:35.820 --> 01:46:40.290

Adam Cmejla: If i'm in your situation, I mean Have you had someone work with you in the past as a team Member.

851

01:46:40.710 --> 01:46:41.010

Mike Rauth: know.

852

01:46:41.130 --> 01:46:42.360

Adam Cmejla: Or have you always been a solo person.

853

01:46:42.540 --> 01:46:43.680

Mike Rauth: always been a solo.



854

01:46:44.490 --> 01:46:54.300

Adam Cmejla: So I think back I started this business back in 2007 the first hire that I had as a part time assistant at 15 hours a week in 2011 and my only regret was that I didn't hire someone at 10 hours a week, two years before that.

855

01:46:56.130 --> 01:47:08.760

Adam Cmejla: So I would see that as being the first domino that you there's a lot of dominoes that have to fall in your path, right now, but I see hiring someone to help you execute all of this because you're going to be the biggest bottleneck and making all this happen.

856

01:47:09.390 --> 01:47:19.890

Adam Cmejla: you're there you cannot do everything, all by yourself, so I think hiring someone and getting clear on the guard rails around what you will do and, more importantly, what you won't do in your business.

857

01:47:20.220 --> 01:47:22.350

Adam Cmejla: and use that to formulate your job description.

858

01:47:22.650 --> 01:47:33.240

Adam Cmejla: is probably the problem behind the problem that need that needs to get solved first, which will make the execution of the service model that much easier because guess what it's going to be things that this person is really good at and enjoys doing.

859

01:47:33.450 --> 01:47:41.250

Adam Cmejla: and probably not the things, certainly not the things that drive your economic engine and probably not the things that are above the line activities for you is that a fair assessment.

860

01:47:41.880 --> 01:47:52.200

Mike Rauth: yeah absolutely and you know I mean, I feel I have several wins from limitless is my first year limitless but you know i've really clarified my niche i've.

861

01:47:52.710 --> 01:48:09.360

Mike Rauth: updated my TV i've stripped out all the stuff that doesn't relate to my niche i've increased my prices have communicated that to my client clients, so you know i've made a lot of progress but i've kind of got bogged down figuring out how to go from here to next steps.

862

01:48:09.630 --> 01:48:17.070

Stephanie Bogan: And what we're really talking about for Mike, and this applies to all of you there's really two conversations happening here one is what should he focuses time on.

863

01:48:17.430 --> 01:48:23.490

Stephanie Bogan: And the second is leverage right so clarity is one of the seven mindsets leverage is another one of the seven mindsets.



864

01:48:23.760 --> 01:48:33.630

Stephanie Bogan: So, from a from a focus and lesson Stan and Mike re just based on what you shared and kind of what you dug into with Adam President key phase one a breakout together is one the.

865

01:48:35.280 --> 01:48:46.470

Stephanie Bogan: came top five star service system, the client model meeting and the searches, because those really ultimately when you do those you're designing kind of the the delivery system that we talked about.

866

01:48:47.010 --> 01:48:56.280

Stephanie Bogan: So to Adams point you will all make a choice when you're doing those lessons there's I want you to think about like Level one on one right like your bachelor's program and then sort of yours your second level.

867

01:48:56.610 --> 01:49:01.590

Stephanie Bogan: You can build a service model up front, where it's very focused on right these the calls us to the meetings.

868

01:49:01.980 --> 01:49:08.910

Stephanie Bogan: And you know, and then you can layer the agenda, the way that you have and then what tanya has done and Adam and the other coaches are doing is.

869

01:49:09.120 --> 01:49:16.650

Stephanie Bogan: With the quarterly value as they're becoming monthly value adds, quite honestly, is we're pulling a lot of the planning and inflict we're pulling that work.

870

01:49:17.070 --> 01:49:23.910

Stephanie Bogan: Out of the meetings, because, do you really need to have a deep conversation about beneficiary reviews unless there's an issue, so if you do that in February.

871

01:49:24.180 --> 01:49:28.590

Stephanie Bogan: You go through the process you identify there's an issue what goes on that clients next meeting agenda.

872

01:49:29.310 --> 01:49:35.910

Stephanie Bogan: And official review so that's the personal part of the agenda, so you see like you can ultimately get the CRM to build your agendas for you, which is really cool.

873

01:49:36.390 --> 01:49:41.220

Stephanie Bogan: you're not there yet right so step one is meetings and calls like what's your basic structure.

874

01:49:41.700 --> 01:49:43.080



Stephanie Bogan: Then, what are you going to like.

875

01:49:43.380 --> 01:49:52.530

Stephanie Bogan: that's why model meeting is important because it helps you decide at this level, and you will refine over time, like you're not matt you're not right we're not going to the hundred foot dive board to start we're going to start at the 10 foot board.

876

01:49:53.340 --> 01:49:59.610

Stephanie Bogan: What can you implement to Adams other point, like you also have to do this, keeping in mind people process and platform.

877

01:49:59.970 --> 01:50:07.170

Stephanie Bogan: So you might not be able to get to that third level right that PhD level of service model until you get some leverage over here.

878

01:50:07.590 --> 01:50:18.120

Stephanie Bogan: But you can absolutely get you know to meetings to phone calls okay we're going to get our right that conversation with clients, we want to put you on a predictable proactive system right we realized that.

879

01:50:18.360 --> 01:50:26.970

Stephanie Bogan: planning is open and organic and ongoing and we need to build a schedule to be there present where you can build that story all day long put them on to meetings to do folk to check in calls.

880

01:50:27.570 --> 01:50:36.600

Stephanie Bogan: You get that done, then you know, then you can start to break out the monthly or you can do those at the same time just depending on you know time and space to Adam around staffing.

881

01:50:37.410 --> 01:50:49.470

Adam Cmejla: And I know where the bottom of the hour here Mike so I want to respect everybody's time but I guess my like semi rhetorical question that i'd asked you is what's been the what's been the biggest challenge in growing your team and bringing someone bringing someone else on.

882

01:50:50.520 --> 01:51:02.550

Mike Rauth: Until I until I joined limitless this year I thought I would just remain a solo advisor all the time, but anyway, so my my mind has changed on that going through this program.

883

01:51:03.210 --> 01:51:15.450

Adam Cmejla: Okay okay i'll i'll stand by that like if i'm in your situation that's, the first thing that i'm solving for right here is, I know I need to build these things, who not how do I do that.

884

01:51:15.870 --> 01:51:24.330

Mike Rauth: yeah so I mean that was one of the first books, I read out of the reading list and identified the blue line stuff and I said okay i'm not going to do this stuff anymore and.



885

01:51:25.770 --> 01:51:26.400

Mike Rauth: i'm ready to move.

886

01:51:27.450 --> 01:51:35.370

Stephanie Bogan: Just understand that, no matter when you get that person, depending on the virtual system programs you use they have a waiting list right now that's usually a couple of months long so.

887

01:51:35.670 --> 01:51:44.880

Stephanie Bogan: Adam is right, but you also just you're going to find that person you've got to train that person, you can sit down with those three lessons in the next 30 6090 days and get a lot of that work.

888

01:51:45.240 --> 01:51:54.690

Stephanie Bogan: The outlines you're going to sit down the new assistant is not going to tell you that so again I want like that part is absolutely accurate like make that step if it's.

889

01:51:54.990 --> 01:52:06.900

Stephanie Bogan: If it's five hours a week as soon as you can swing that, because what it teaches you is that there's life on the other side of the fence and you will find ways to get to 10 hours to 15 hours to 20 hours.

890

01:52:07.170 --> 01:52:10.500

Stephanie Bogan: So it's that next best step if it's five hours or 10 hours a week.

891

01:52:10.860 --> 01:52:17.190

Stephanie Bogan: And, depending on the timeline with that person in the training time you can still be working on those lessons at the strat you know.

892

01:52:17.760 --> 01:52:26.010

Stephanie Bogan: This is what i'm going to do, you can design and do the worksheets get it ready and then, when you've got that person, they can help you build the details the workflows the systems, etc.

893

01:52:26.850 --> 01:52:32.640

Stephanie Bogan: So that's just going to be a function of timing items right if you had that person there and training tomorrow that person should be leading the charge.

894

01:52:33.270 --> 01:52:39.960

Adam Cmejla: And don't overthink it grabbed the wall calendar that Stephen the team sent out earlier in the year that's if you're looking for how to how to visualize this big picture.

895

01:52:40.500 --> 01:52:42.000

Adam Cmejla: But truth be told, like.



896

01:52:42.810 --> 01:52:52.950

Adam Cmejla: Stephen did like can you send us copies of your service calendar like I took a picture of the calendar that's on my big dry erase board because that's how it is, I know, in January we're doing goal setting february's profit sharing March.

897

01:52:53.220 --> 01:52:57.030

Adam Cmejla: Is insurance review April is a review month for us then.

898

01:52:57.510 --> 01:52:58.680

Stephanie Bogan: may work.

899

01:52:58.860 --> 01:52:59.280

Adam Cmejla: it's like.

900

01:52:59.400 --> 01:53:08.280

Stephanie Bogan: The workflows take care of the details, so he doesn't have to worry about the details because they're in right that's your respective whether it's a checklist whether it's.

901

01:53:08.940 --> 01:53:23.160

Stephanie Bogan: A CRM workflow or whether it's an automated workflow right there just again those the same three levels right start with the checklist build it into a great your CRM system and build it into an automated workflow if you can skip to automated workflow grapes.

902

01:53:23.670 --> 01:53:35.490

Stephanie Bogan: But you can't always you can always start there so, especially if you're only doing you know, a certain number of projects at a time so Adam thank you ladies great feedback Mike was that helpful to do you love being in the hot seat and so fun.

903

01:53:35.910 --> 01:53:37.770

Mike Rauth: I did it was fantastic Thank you.

904

01:53:37.770 --> 01:53:38.340

Mike Rauth: very much.

905

01:53:38.400 --> 01:53:38.850

Stephanie Bogan: you're welcome.

906

01:53:39.090 --> 01:53:39.510

Stephanie Bogan: So, are you.



907

01:53:39.870 --> 01:53:41.040

Adam Cmejla: started the hot seat that's a lot.

908

01:53:44.370 --> 01:53:49.890

Stephanie Bogan: Oh don't worry guys, I still have coaching calls, with all the coaches, I promise you, they get their hot seat done.

909

01:53:50.370 --> 01:53:56.910

Stephanie Bogan: it's all good, we are all here elevating each other, that is the point of each other, build wildly successful businesses and lives that we love.

910

01:53:57.240 --> 01:54:01.860

Stephanie Bogan: Adam think, thank you, as always, for joining us today Mike, thank you for volunteering to be in the hot seat.

911

01:54:02.220 --> 01:54:08.520

Stephanie Bogan: When we're coaching one of you were coaching all of you right you all relate to some form of the issues past, present or future so.

912

01:54:08.820 --> 01:54:14.490

Stephanie Bogan: Hopefully, it was valuable to you today to get that clarity around where you are at the half of the almost halfway point.

913

01:54:14.820 --> 01:54:27.930

Stephanie Bogan: As a shared, we will be sending announcements out on the mini makeup retreats later this week I believe super excited to see you all in person, so with that anything else I need to cover allison good.

914

01:54:28.650 --> 01:54:29.550

Allison Foulk: nope we're good.

915

01:54:29.910 --> 01:54:31.410

Stephanie Bogan: All right, ladies and gentlemen, have a great day.

